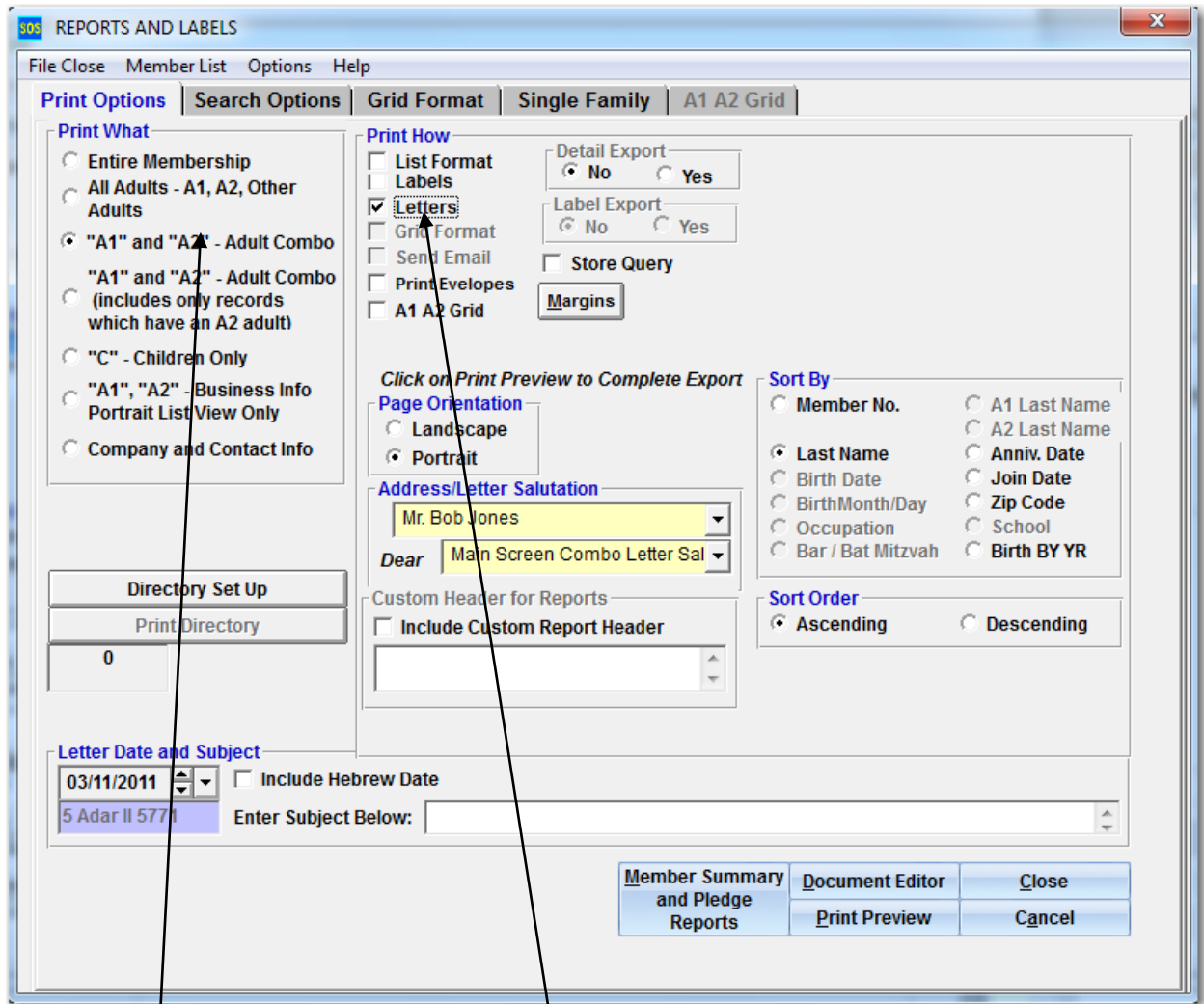


How to Send out Anniversary letters

January 2011

Purpose: To demonstrate how to send Anniversary letters from SOS, using the built-in SOS letters feature.

From the General Family Screen, select Reports and labels. The following screen will appear.



Click on A1 and A2 Adult Combo

Click on Letters

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The screenshot shows the 'REPORTS AND LABELS' window with the 'Search Options' tab selected. The 'Detailed List of Search Filters' section includes checkboxes for various criteria: Member # From, Last Name, Home City Like, Zip Code From, Birthmonth/Day From, Age From, Anniv From, Anniv Month / Day, Join Date From, Resign Date From, Gender, Occupation, Public School, Pub. School Grade, Members with Multiple Home Addresses Using Address Dates, Only Members Wishing to Receive Mailings, Renew Date From, Birthday From, Bar/Bat Mitzvah From, and School Year (with a dropdown menu). The 'Do a Quick Search (Uncheck for Detailed Search)' section has checkboxes for Category, Year, and Month of. The 'User Defined field Search(Grid Only)' section has a checkbox for Defined Field Name. The 'Check/Uncheck here to view Member Type' section has checkboxes for Member Type (checked) and Member Attributes. Below this is a table of Member Types: Active (checked), Archive, Cemetery, CIT, and Company. The 'Filter by State(s)/Province(s)' section has a 'Print Preview' button, an 'Add / Update Query' button, and an 'Available Queries' dropdown menu with a 'Retrieve Saved Query' button. The 'Filter by Country' section has a dropdown menu.

Click on Do a Quick Search
Click on category and select married in
Click on Month of and select the appropriate Month
Click on Year and enter a year range

For example, you may want to send a 10 year anniversary letter to everyone married in the Month of May. Therefore, click on May, enter 1995 to 1995 (based on today being 5/1/2005).

Then click on Print Options.
Click on Document editor and enter the your letter.
You can save the document as a word document or a txt document.
(select File save as)
Then click on the close button, upper right corner or File Exit
Then click print preview.

The letters will be displayed in print preview mode.

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You can also export, the same criteria to a text file and do a mail merge with Microsoft Word. Please contact ATG to receive this document.

The screenshot shows the 'MEMBERSHIP' window for member Leonard Ansin. The 'Family Status' field is set to 'A1', and the 'Wedding Anniversary' is '05/11/2006'. A callout box points to the 'A1' field.

Member #	Title	First Name	Middle Name	Last Name	Marital Status
T99999	Mr.	Leonard		Ansin	Married

Nickname	Hebrew Name	Family Status	Maiden
Leonard		A1	

DOB	Age	M/F	DOD	Wedding Anniversary
01/01/1970	41.2	M		05/11/2006

Personal Address	Contact Info	Correspondence
<p>Use Address: <input checked="" type="radio"/> Family <input type="radio"/> In List <input type="radio"/> Add New</p> <p>107 Clocktower Dr. #301, Waltham, MA 02254-9</p> <p>Address 107 Clocktower Dr. #301</p> <p>City/St/Zip Waltham MA 02254-9110</p> <p>Country United States</p> <p>Main Phone 617-413-9100</p>	<p>Click here to send member Email</p> <p>LANSIN@ANSINTECH.COM</p> <p>Website</p> <p>Personal Line 617-413-9100</p> <p>Cell 617-413-9100</p> <p>Emergency Contact</p> <p>Emergency Tel</p>	<p>Mailing Label Leonard Ansin</p> <p>Leonard Ansin</p> <p>Letter Salutation Leonard</p> <p>Leonard</p> <p>Bar/Bat Mitzvah 27 Shevat 5771 02/01/2011</p> <p>Confirmation Date 12 Adar I 5771 02/16/2011</p>

It's important that the A1 Anniversary field is completed for all members that you want to receive letters

For more details about SOS visit our web site at www.ansintech.com

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